EDEWG Change Request #151v2

This EDEWG Change Request can be found on the PUC website at <http://www.puc.pa.gov/electric/electric_edewg_download.aspx>

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| --- | --- | --- |
| **Requester’s Name**:  Ernie Mathie | **EDC/EGS Name**:  FirstEnergy Corp. | **Phone #** :  330-384-5757 |
| **Date of Request**:  04/25/19 | **Affected EDI Transaction Set #(s)**:  867HU, 867HIU | **E-Mail Address**:  mathiee@firstenergycorp.com |
| **Requested Priority** (emergency/high/low): High | **Requested Implementation Date**:  August 9, 2019 | **Status**:  APPROVED / Pending update to IG |

**Brief Explanation** (This will be copied into the description in the Change Control Summary Spreadsheet):

For FirstEnergy use only, add new REF\*6W line to 867 historical usage transactions to account for reporting delivered and received kWh for net metered accounts. Since FirstEnergy utilizes only one meter for net metered accounts, reporting at the meter level is not possible. This will also align with the use of this line for net metered accounts in the 867MU and 867IU which was recently approved in PA via Change Control 150.

**Detail Explanation** (Exactly what change is required? To which EDEWG Standards? Why?):

This Change Control is being suggested for use in Pennsylvania only for reporting historical usage for net metering since Smart Meters will now be installed on these accounts. The use of Delivered kWh for Distribution Service and Received kWh for Purchased Power (customer generation) will better align with data provided PJM for settlements in lieu of providing net kWh.

In order to accomplish this, FirstEnergy wishes to utilize the REF\*6W line under the PTD\*SU loop and PTD\*BQ loop (867HIU only) to report the delivered and received kWh separately in lieu of just reporting net usage. This would require the use of two PTD\*SU loops and two PTD\*BQ loops for kWh. Channel 1 would indicate the interval usage that follows is delivered and Channel 2 would indicate the following interval usage is received. Reporting the usage by meter number did not seem doable as these accounts would have only one meter so it was thought using the same meter number for both delivered and received usage would be confusing for the supplier. This would be a new REF line in both the 867HU and 867HIU transactions and in both would indicate for “Used by FirstEnergy: Channel 1 = Delivered kWh and Channel 2 = Received kWh”. Note: Until 12 months of interval data is available, the PTD\*BQ loops in the 867HIU will only contain the interval data for whatever period is available. Changes/example for the 867HIU are below on pgs. 2-5 and changes/example for the 867HU are below on pgs. 6-9.

FirstEnergy would appreciate this Change Control be approved by the June EDEWG Conference Call at the latest to allow implementation by August 9th.

**For Change Control Manager Use Only:**

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| --- | --- | --- |
| Date of EDEWG Discussion:  5/9/2019, 7/11/2019 | Expected Implementation Date:  8/9/2019 |  |

**EDEWG Discussion and Resolution**:

4/25/2019 – Brandon Siegel: received request, assigned #151 and placed on May 2019 meeting agenda.

5/9/2019 – Brandon Siegel: EDEWG reviewed and approved CC #151 without revision. Brandon Siegel formally requested FirstEnergy provide EDI examples of where net meter is added and removed to show how the looping & dates will be sent. CC #151 will be implemented in the next version update to the regional EDI Implementation Guidelines.

7/3/2019 – Brandon Siegel: updated as Version 2 due to correction in the DTM582 segment and the BPT04 in the 867HI example transaction at the end of CC.

7/11/2019 – Brandon Siegel: discussed v2 with EDEWG, no need for re-approval. CC151v2 will supersede CC151 and will be implemented in the next version update to the regional EDI Implementation Guidelines.

***Priority Classifications***

|  |  |
| --- | --- |
| *Emergency Priority* | *Implemented within 10 days or otherwise directed by EDEWG* |
| *High Priority* | *Changes / Enhancements implemented with 30 days. The next release, or as otherwise directed by EDEWG* |
| *Low Priority* | *Changes / Enhancements implemented no earlier than 90 days, Future Release, or as otherwise directed by EDEWG* |

***Please submit this form via e-mail to both the PUC at*** [jmccracken@pa.gov](mailto:jmccracken@pa.gov) ***and*** [lyalcin@pa.gov](mailto:lyalcin@pa.gov) ***and to the***

***Change Control Manager, Brandon Siegel at*** [brandon.siegel@intelometry.com](mailto:brandon.siegel@intelometry.com)

*Your request will be evaluated and prioritized at an upcoming EDEWG meeting or conference call.*

**EDI 867 Historical Interval Usage:** Changes to the Pennsylvania Notes Section



**EDI 867 Historical Interval Usage:** New REF segment in SU and BQ loop(s)

## Segment: REF Reference Identification (6W=Channel Number)

**Position:** 030

**Loop:** PTD

**Level:** Detail

**Usage:** Optional

**Max Use:** 20

**Purpose:** To specify identifying information

**Syntax Notes:** **1** At least one of REF02 or REF03 is required.

**2** If either C04003 or C04004 is present, then the other is required.

**3** If either C04005 or C04006 is present, then the other is required.

**Semantic Notes:** **1** REF04 contains data relating to the value cited in REF02.

**Comments:**

|  |  |  |
| --- | --- | --- |
| **PA Use:** |  | Used by FirstEnergy: Channel 1 = Delivered kWh and Channel 2 = Received kWh |
| **NJ Use:** |  | N/A |
| **DE Use:** |  | N/A |
| **MD Use:** |  | N/A |
| **Example:** |  | REF\*6W\*1 |

**Data Element Summary**

**Ref. Data**

**Des. Element Name Attributes**

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Must Use** | **REF01** | **128** | **Reference Identification Qualifier** | | | | **M** |  | **ID 2/3** | | |
|  | | | Code qualifying the Reference Identification | | | | | | | |
|  | | | | 6W |  | Sequence Number | | | | |
|  | | | | | | Channel Number | | | |
| **Must Use** | **REF02** | **127** | **Reference Identification** | | | | **X** |  | **AN 1/30** | | |
|  | | | Reference information as defined for a particular Transaction Set or as specified by the Reference Identification Qualifier | | | | | | | |
|  | | | Channel Number | | | | | | | |

**EDI 867 Historical Interval Usage:** Example

BPT\*52\*201903140404550002229777\*20190314\*C1

N1\*SJ\*SUPPLIER NAME\*1\*123456789ABCD

N1\*8S\*METED-DISTRIBUTION\*1\*007916836

N1\*8R\*CUSTOMER NAME

REF\*12\*08009850040002435782

PTD\*FG

REF\*NH\*ME-RSD

REF\*LO\*RSNH

REF\*BF\*68

REF\*SV\*Secondary, voltage unknown

REF\*LF\*1.071800

QTY\*KZ\*3.3045000\*K1

DTM\*007\*\*\*\*RD8\*20190101-20191231

QTY\*KC\*2.3475000\* K1

DTM\*007\*\*\*\*RD8\*20180601-20190531

QTY\*KC\*2.5369000\* K1

DTM\*007\*\*\*\*RD8\*20190601-20200531

PTD\*SU

REF\*6W\*1 🡸======DELIVERD CHANNEL ID

QTY\*KA\*2037.0000000\*KH

DTM\*150\*20180309

DTM\*151\*20180409

QTY\*QD\*2998.0000000\*KH

DTM\*150\*20180410

DTM\*151\*20180507

QTY\*QD\*2753.0000000\*KH

DTM\*150\*20180508

DTM\*151\*20180607

QTY\*QD\*2052.0000000\*KH

DTM\*150\*20180608

DTM\*151\*20180709

QTY\*QD\*2149.0000000\*KH

DTM\*150\*20180710

DTM\*151\*20180807

QTY\*QD\*2113.0000000\*KH

DTM\*150\*20180808

DTM\*151\*20180909

QTY\*QD\*2635.0000000\*KH

DTM\*150\*20180910

DTM\*151\*20181008

QTY\*QD\*2499.0000000\*KH

DTM\*150\*20181009

DTM\*151\*20181106

QTY\*QD\*2511.0000000\*KH

DTM\*150\*20181107

DTM\*151\*20181206

QTY\*QD\*2760.0000000\*KH

DTM\*150\*20181207

DTM\*151\*20190109

QTY\*QD\*2613.0000000\*KH

DTM\*150\*20190110

DTM\*151\*20190206

QTY\*QD\*2594.0000000\*KH

DTM\*150\*20190207

DTM\*151\*20190307

PTD\*SU

REF\*6W\*2 🡸=======RECEIVED CHANNEL ID

QTY\*9H\*1007.0000000\*KH

DTM\*150\*20180309

DTM\*151\*20180409

QTY\*87\*1098.0000000\*KH

DTM\*150\*20180410

DTM\*151\*20180507

QTY\*87\*1053.0000000\*KH

DTM\*150\*20180508

DTM\*151\*20180607

QTY\*87\*1105.0000000\*KH

DTM\*150\*20180608

DTM\*151\*20180709

QTY\*87\*1149.0000000\*KH

DTM\*150\*20180710

DTM\*151\*20180807

QTY\*87\*1113.0000000\*KH

DTM\*150\*20180808

DTM\*151\*20180909

QTY\*87\*1035.0000000\*KH

DTM\*150\*20180910

DTM\*151\*20181008

QTY\*87\*1099.0000000\*KH

DTM\*150\*20181009

DTM\*151\*20181106

QTY\*87\*1011.0000000\*KH

DTM\*150\*20181107

DTM\*151\*20181206

QTY\*87\*1060.0000000\*KH

DTM\*150\*20181207

DTM\*151\*20190109

QTY\*87\*1013.0000000\*KH

DTM\*150\*20190110

DTM\*151\*20190206

QTY\*87\*1094.0000000\*KH

DTM\*150\*20190207

DTM\*151\*20190307

PTD\*BQ

DTM\*150\*20180309

DTM\*151\*20190307

REF\*MT\*KH015

REF\*6W\*1 🡸=======DELIVERED CHANNEL ID FOR INTERVAL USAGE

QTY\*QD\*76.00000000\*KH

DTM\*582\*20180309\*0015\*ES

QTY\*QD\*16.80000000\*KH

DTM\*582\*20180309\*0030\*ES

QTY\*QD\*73.60000000\*KH

DTM\*582\*20180309\*0045\*ES

QTY\*QD\*78.40000000\*KH

DTM\*582\*20180309\*0100\*ES

PTD\*BQ

DTM\*150\*20180309

DTM\*151\*20190307

REF\*MT\*KH015

REF\*6W\*2 🡸=======RECEIVED CHANNEL ID FOR INTERVAL USAGE

QTY\*87\*6.00000000\*KH

DTM\*582\*20180309\*0015\*ES

QTY\*87\*6.80000000\*KH

DTM\*582\*20180309\*0030\*ES

QTY\*87\*3.60000000\*KH

DTM\*582\*20180309\*0045\*ES

QTY\*87\*8.40000000\*KH

DTM\*582\*20180309\*0100\*ES

**EDI 867 Historical Usage:** New REF segment in SU loop(s)

## Segment: REF Reference Identification (6W=Channel Number)

**Position:** 030

**Loop:** PTD

**Level:** Detail

**Usage:** Optional

**Max Use:** 20

**Purpose:** To specify identifying information

**Syntax Notes:** **1** At least one of REF02 or REF03 is required.

**2** If either C04003 or C04004 is present, then the other is required.

**3** If either C04005 or C04006 is present, then the other is required.

**Semantic Notes:** **1** REF04 contains data relating to the value cited in REF02.

**Comments:**

|  |  |  |
| --- | --- | --- |
| **PA Use:** |  | Used by FirstEnergy: Channel 1 = Delivered kWh and Channel 2 = Received kWh |
| **NJ Use:** |  | N/A |
| **DE Use:** |  | N/A |
| **MD Use:** |  | N/A |
| **Example:** |  | REF\*6W\*1 |

**Data Element Summary**

**Ref. Data**

**Des. Element Name Attributes**

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Must Use** | **REF01** | **128** | **Reference Identification Qualifier** | | | | **M** |  | **ID 2/3** | | |
|  | | | Code qualifying the Reference Identification | | | | | | | |
|  | | | | 6W |  | Sequence Number | | | | |
|  | | | | | | Channel Number | | | |
| **Must Use** | **REF02** | **127** | **Reference Identification** | | | | **X** |  | **AN 1/30** | | |
|  | | | Reference information as defined for a particular Transaction Set or as specified by the Reference Identification Qualifier | | | | | | | |
|  | | | Channel Number | | | | | | | |

**EDI 867 Historical Usage:** Changes to the Pennsylvania Notes Section

|  |  |  |
| --- | --- | --- |
|  |  | **Pennsylvania Notes** |
| 1. **Requirements for uniform support of Net Metered Customers** |  | The Pennsylvania default is 12 months of Historical Usage, the following EDCs offer more than 12 months…   * 1. PECO – default is 24 months * SU (Account Services Summary) Loop –reports consumption summarized/totalized for account by unit of measure for net metered customers. (Citizens & Wellsboro, First Energy, PPL, and UGI support)   All PA EDCs (Excluding FirstEnergy)   1. When the customer’s consumption is greater than generation for a given service period, the KH will be reported as net consumption (QTY01 w/actual = QD or estimated = KA) with the total generation subtracted from total consumption. 2. When the customer’s generation is greater than consumption for a given service period, the KH will be reported as net generation (actual = 87 or estimated = 9H) with the total consumption subtracted from total generation). 3. In either scenario, the QTY02 will never be signed negative.   FirstEnergy Companies  Instead of reporting net KH in SU loop, FirstEnergy will report the consumption  (REF\*6W\*1) and generation (REF\*6W\*2) separately.  Reports consumption (delivered) KH (QTY01 w/actual = QD or estimated = KA)  Reports generation (received) KH (QTY01 w/actual = 87 or estimated = 9H)   * RT (Rate) Loop –reports consumption summarized/totalized by rate and by unit of measure for net metered customers. (PECO supports)  1. When the customer’s consumption is greater than generation for a given service period, the KH will be reported as net consumption (QTY01 w/actual = QD or estimated = KA) with the total generation subtracted from total consumption. 2. When the customer’s generation is greater than consumption for a given service period, the KH will be reported as net generation (actual = 87 or estimated = 9H) with the total consumption subtracted from total generation). 3. In either scenario, the QTY02 will never be signed negative.  * PM (Meter Detail) Loop – reports consumption provided by meter by unit of measure for net metered customers: (Duquesne only)  1. Single meter reporting both in and out flow.    1. When the customer’s consumption is greater than generation for a given service period, the KH will be reported as net consumption (QTY01 w/actual = QD or estimated = KA) with the total generation subtracted from total consumption.    2. When the customer’s generation is greater than consumption for a given service period, the KH will be reported as net generation (actual = 87 or estimated = 9H) with the total consumption subtracted from total generation).    3. In either scenario, the QTY02 will never be signed negative. |
|  |  |  |

**EDI 867 Historical Usage :** Example

BPT\*52\*201903140404550002229777\*20190314\*DD

N1\*SJ\*SUPPLIER NAME\*1\*123456789ABCD

N1\*8S\*METED-DISTRIBUTION\*1\*007916836

N1\*8R\*CUSTOMER NAME

REF\*12\*08012345678900056487

PTD\*FG

REF\*NH\*ME-RSD

REF\*LO\*RSNH

REF\*BF\*68

REF\*SV\*Secondary, voltage unknown

REF\*LF\*1.071800

QTY\*KZ\*3.3045000\*K1

DTM\*007\*\*\*\*RD8\*20190101-20191231

QTY\*KC\*2.3475000\* K1

DTM\*007\*\*\*\*RD8\*20180601-20190531

QTY\*KC\*2.5369000\* K1

DTM\*007\*\*\*\*RD8\*20190601-20200531

PTD\*SU

REF\*6W\*1 🡸======DELIVERED CHANNEL ID

QTY\*KA\*37.0000000\*KH

DTM\*150\*20180309

DTM\*151\*20180409

QTY\*QD\*998.0000000\*KH

DTM\*150\*20180410

DTM\*151\*20180507

QTY\*QD\*753.0000000\*KH

DTM\*150\*20180508

DTM\*151\*20180607

QTY\*QD\*1052.0000000\*KH

DTM\*150\*20180608

DTM\*151\*20180709

QTY\*QD\*1149.0000000\*KH

DTM\*150\*20180710

DTM\*151\*20180807

QTY\*QD\*1113.0000000\*KH

DTM\*150\*20180808

DTM\*151\*20180909

QTY\*QD\*635.0000000\*KH

DTM\*150\*20180910

DTM\*151\*20181008

QTY\*QD\*499.0000000\*KH

DTM\*150\*20181009

DTM\*151\*20181106

QTY\*QD\*511.0000000\*KH

DTM\*150\*20181107

DTM\*151\*20181206

QTY\*QD\*760.0000000\*KH

DTM\*150\*20181207

DTM\*151\*20190109

QTY\*QD\*613.0000000\*KH

DTM\*150\*20190110

DTM\*151\*20190206

QTY\*QD\*594.0000000\*KH

DTM\*150\*20190207

DTM\*151\*20190307

PTD\*SU

REF\*6W\*2 🡸=======RECEIVED CHANNEL ID

QTY\*9H\*7.0000000\*KH

DTM\*150\*20180309

DTM\*151\*20180409

QTY\*87\*98.0000000\*KH

DTM\*150\*20180410

DTM\*151\*20180507

QTY\*87\*53.0000000\*KH

DTM\*150\*20180508

DTM\*151\*20180607

QTY\*87\*105.0000000\*KH

DTM\*150\*20180608

DTM\*151\*20180709

QTY\*87\*149.0000000\*KH

DTM\*150\*20180710

DTM\*151\*20180807

QTY\*87\*113.0000000\*KH

DTM\*150\*20180808

DTM\*151\*20180909

QTY\*87\*35.0000000\*KH

DTM\*150\*20180910

DTM\*151\*20181008

QTY\*87\*99.0000000\*KH

DTM\*150\*20181009

DTM\*151\*20181106

QTY\*87\*11.0000000\*KH

DTM\*150\*20181107

DTM\*151\*20181206

QTY\*87\*60.0000000\*KH

DTM\*150\*20181207

DTM\*151\*20190109

QTY\*87\*13.0000000\*KH

DTM\*150\*20190110

DTM\*151\*20190206

QTY\*87\*94.0000000\*KH

DTM\*150\*20190207

DTM\*151\*20190307